

[Forms](#)
[Contact List](#)
[SBMS Instructions](#)
[Help Desk](#)

Find Subject Areas:

[Show Side Menu](#) **Search Subject Areas & Legacy Documents:**

Contents: Conference Management

Effective Date: **June 2000**

Point of Contact: [Special Conference Administrator](#)

| Section | Overview of Content (see section for full process) |
|---|--|
| Introduction | |
| 1. Sponsoring or Co-sponsoring Conferences | <ul style="list-style-type: none"> • Determine if conference is non-reportable or reportable. • Complete forms. • Obtain approvals. • Report number of DOE traveling attendees to SCA. |
| 2. Attendance of BNL Employees/Guests/Visitors at Conferences | <ul style="list-style-type: none"> • Determine if conference is non-reportable or reportable. • Complete paperwork. • Obtain approvals. |
| Definitions | |
| Exhibits | |
| Conference Attendance Flowchart | |
| Conference Sponsor or Co-sponsor Flowchart | |
| Examples of Non-reportable Conferences | |
| General Considerations for Sponsoring and Co-sponsoring Conferences | |
| Forms | |
| Criteria for Conference Approval | |
| Department/Division Conference Attendance Request | |
| Sponsored Conference Approval Request Form | |

Training Requirements and Reporting Obligations

This subject area does not contain training requirements.

This subject area may or may not contain reporting obligations.

References

[Conference Services](#), [Staff Services Division](#) Web Site

DOE Order 110.3, Conference Management

Hotel and Motel Fire Safety Act of 1990 (P.L. 101-391, as amended).

Standards of Ethical Conduct for Employees of the Executive Branch (5 Code of Federal Regulations 2635).

Standards of Performance

All staff and guests shall comply with applicable Laboratory policies, standards, and procedures, unless a formal variance is obtained.

Management System


This subject area belongs to the **Administrative Support** management system.

[Back to Top](#)

The only official copy of this file is the one online in SBMS. Before using a printed copy, verify that it is the most current version by checking the document effective date on the BNL SBMS website.

1.4-092004-/standard/2a/2a00t011.htm

Send a question or comment to the [SBMS Help Desk](#)
[Disclaimer](#)



| | | | |
|-------|--------------|-------------------|-----------|
| Forms | Contact List | SBMS Instructions | Help Desk |
|-------|--------------|-------------------|-----------|

Find Subject Areas: Index ▼ Categories ▼ Alpha ▼

Show Side Menu

Search Subject Areas & Legacy Documents:

Introduction: Conference Management

Effective Date: **June 2000**

Point of Contact: [Special Conference Administrator](#)

The Laboratory is required to manage conferences that it sponsors or co-sponsors in accordance with the guidelines set under DOE Order 110.3, which is part of BSA's prime contract for the management and operations of the Brookhaven National Laboratory (BNL). BNL employees' attendance at conferences and participation at conferences is also subject to the Order. This includes the planning, implementation, and reporting of conferences.

The Order is designed to minimize costs and attendance by DOE and DOE contractor employees at all conferences. In addition, the Order is meant to clarify the requirements for funding conferences in compliance with existing laws and regulations.

The Staff Services Division is responsible for the administration of procedures required for Laboratory compliance with Conference Management requirements and procedures. It oversees and assists in the submission of conference sponsorship and attendance approval requests, coordinates the approval process, and collects data for, prepares, and submits required reports to DOE. It also administers the deposits and expenditures of conference funds.

This subject area provides the requirements of conference management as defined by the following categories:

- Conferences exempt from the requirements of DOE Order 110.3;
- BNL-Sponsored or -Co-sponsored Conferences;
- Binding Arrangements;
- Attendance Reporting of BNL Employees at Conferences;
- Conferences Sponsored by Private Interest.


Costs associated with the activities under this subject area are guided by Article 32, Allowable Cost and Fixed Fee, of BSA's prime contract with the DOE for the operation of Brookhaven National Laboratory.

[Back to Top](#)

The only official copy of this file is the one online in SBMS. Before using a printed copy, verify that it is the most current version by checking the document effective date on the BNL SBMS website.

1.2-032002/standard/2a/2a00i011.htm

Send a question or comment to the [SBMS Help Desk](#)
[Disclaimer](#)



Forms
Contact List
SBMS Instructions
Help Desk

Find Subject Areas: Index ▼ Categories ▼ Alpha ▼

Show Side Menu Search Subject Areas & Legacy Documents:

Subject Area: **Conference Management**

1. Sponsoring or Co-sponsoring Conferences

Effective Date: **June 2000**

Point of Contact: [Special Conference Administrator](#)

Applicability

This information applies to staff managing sponsored or co-sponsored conferences.

Required Procedure

Refer to the [Conference Sponsor or Co-sponsor Flowchart](#) for an overview of this procedure.

See the [Conference Coordinator's Guide](#), [Staff Services Division](#) Web Site for assistance in arranging official conferences, meetings, seminars, or special events at or for BNL.

| | |
|---------------|---|
| Step 1 | The BNL Host of the conference uses the exhibit Criteria for Conference Approval as an aid in deciding whether to hold a conference. |
| Step 2 | The BNL Host of the conference uses the exhibit General Considerations for Sponsoring or Co-sponsoring Conferences when planning to hold a conference. |
| Step 3 | <p>To allow time for processing the request for approval of a conference, a minimum of 90* days before the anticipated date of any conference binding agreement (i.e., hotel contract), either the Conference Coordinator, Host, Department/Division Point-of-Contact (POC), or designee</p> <ul style="list-style-type: none"> • considers if the conference is exempt from the requirements of DOE Order 110.3, Conference Management. If reasons for non-reportable do not apply, go to step 7. The following are reasons for non-reportable: <ul style="list-style-type: none"> ○ Formal structured training programs (including seminars specifically held for training purposes) that have specific objectives identified to improve certain knowledge, skills, and abilities; ○ Activities concerning work not funded by DOE that is conducted |

| | |
|---------------|--|
| | <p>by DOE contractors;</p> <ul style="list-style-type: none"> o Meetings requiring only local travel (not requiring overnight lodging); o Federal Advisory Committee meetings; o Contract preproposal, bid opening, and negotiations; o Public hearings and associated briefings; o Audits, inspections, and investigations; o BNL technical/business programs, projects, or peer reviews; o Activities funded through arrangements, such as grants and cooperative agreements; and o Employees traveling to a site where work for DOE is being performed to discuss the status of the work. <p>See the exhibit on Examples of Non-reportable Conferences for examples of conferences that are exempt from DOE's requirements.</p> <p>*Note: This minimum is strongly recommended as the time required to ensure that all approvals and other conference-supporting events can be completed in a timely manner. The absolute minimum time for the Laboratory to obtain DOE approval for conference sponsorship or co-sponsorship is 30 calendar days.</p> |
| Step 4 | The Department/Division POC or designee ensures that reasons for non-reportable were considered. If the conference is non-reportable and no BSA conference account and/or binding agreement is required, the approval of the conference is at the Department/Division level. No further action regarding this subject area is required. |
| Step 5 | If the conference is non-reportable, but requires a BSA account or binding agreement, either the Conference Coordinator, Host, Department/Division POC, or designee completes the Sponsored Conference Approval Request Form . The Department/Division POC or designee ensures that the form was completed and forwards it to the Special Conference Administrator (SCA) for review. |
| Step 6 | The SCA reviews the form for completeness and notifies the Department/Division POC of the approval to host the conference. |
| Step 7 | <p>To allow time for processing the request for approval of a conference that is reportable, a minimum of 90 days before the anticipated date of any conference binding agreement (i.e., hotel contract) either the Conference Coordinator, Host, Department/Division Point-of-Contact (POC), or designee</p> <ul style="list-style-type: none"> • Estimates the number of DOE-funded attendees (For conferences with less than 30 attendees, follow steps 8, 9, 10, and 11; for conferences with 30 or more attendees, follow steps 8, 9, 10, then 12 and 13); • Completes the Sponsored Conference Approval Request Form. |

| | |
|----------------|--|
| Step 8 | The Department/Division POC or designee ensures that reasons for non-reportable were considered and that the Sponsored Conference Approval Request Form was completed. The POC forwards the form to the SCA. |
| Step 9 | The SCA reviews the form for completeness. |
| Step 10 | <p>The SCA forwards the form to the appropriate Assistant/Associate Laboratory Director (ALD) to obtain approval.</p> <p>Note: Conferences hosted by the Human Resources Division, Internal Audit Office Manager, Diversity Office Manager, Chief Information Office, and the Legal Office Manager require the approval of the Deputy Director for Operations.</p> <p>Note: The BNL sponsor must pay particular attention to describing the relationship of the conference to BNL's mission, the rationale for the site selected and a cost comparison of possible alternative sites (if the location is other than on the installation), and the statement of the impact if the conference is not approved.</p> |
| Step 11 | The SCA notifies the Department/Division POC of the approval. |
| Step 12 | For conferences with 30 or more attendees, after obtaining approval from the ALD, the SCA forwards the Sponsored Conference Approval Request Form to the Deputy Director or Designated Deputy Director for BNL approval and forwards it to the DOE/Brookhaven Site Office (DOE/BHSO) for review and transmittal to the DOE/Chicago Office (DOE/CH) for approval. |
| Step 13 | After receiving DOE/CH approval, the SCA notifies the Department/Division POC of the approval. |

References

[Conference Coordinator's Guide](#), [Staff Services Division](#) Web Site

DOE Order 110.3, Conference Management


| [Continue to Next Page](#) |

[Back to Top](#)

The only official copy of this file is the one online in SBMS. Before using a printed copy, verify that it is the most current version by checking the document effective date on the BNL SBMS website.

1.4-092004/standard/2a/2a01d011.htm

Send a question or comment to the [SBMS Help Desk](#)
[Disclaimer](#)



Forms
Contact List
SBMS Instructions
Help Desk

Find Subject Areas: Index ▼ Categories ▼ Alpha ▼

Show Side Menu Search Subject Areas & Legacy Documents:

Subject Area: **Conference Management**

2. Attendance of BNL Employees/Guests/Visitors at Conferences

Effective Date: **June 2000**

Point of Contact: [Special Conference Administrator](#)

Applicability

This information applies to staff who attend a conference where BNL's DOE funds will fund travel.

Required Procedure

Refer to the [Conference Attendance Flowchart](#) for an overview of this procedure.

| | |
|---------------|---|
| Step 1 | <p>To allow time for processing the request for approval of a conference, a minimum of 60* days before the date of the conference, either the Conference Coordinator, Host, Department/Division Point-of-Contact (POC), or designee</p> <ul style="list-style-type: none"> • Considers if the conference is exempt from the requirements of DOE Order 110.3 Conference Management. If non-reportable, approval by Department/Division procedures, no further action under this procedure is required. The following are reasons for non-reportable: <ul style="list-style-type: none"> ○ Formal structured training programs (including seminars specifically held for training purposes) that have specific objectives identified to improve certain knowledge, skills, and abilities; ○ Activities concerning work not funded by DOE that is conducted by DOE contractors; ○ Meetings requiring only local travel (not requiring overnight lodging); ○ Federal Advisory Committee meetings; ○ Contract preproposal, bid opening, and negotiations; ○ Public hearings and associated briefings; ○ Audits, inspections, and investigations; ○ BNL technical/business programs, projects, or peer reviews; ○ Activities funded through arrangements, such as grants and cooperative agreements; and ○ Employees traveling to a site where work for DOE is being performed to discuss the status of the work. <p>See the exhibit on Examples of Non-reportable Conferences for examples of conferences that are exempt from DOE's requirements. If a reason for non-reportable applies, no further action regarding this subject area is required.</p> <ul style="list-style-type: none"> • If reportable, determines if travel is for a BNL Scientific/Technical employee invited to |
|---------------|---|

| | |
|---------------|--|
| | <p>be a guest lecturer, speaker, or presenter on a subject related to work performed at BNL, or is involved in organizing, acting as a member of a committee, or supplies administrative support;</p> <ul style="list-style-type: none"> Estimates the number of their Department/Division DOE-funded employees requesting to attend the conference; Completes the Department/Division Conference Attendance Request with the number of employees. <p>In determining whether employees should participate in a conference sponsored by private interest, the Department/Division must determine that participation is in the Laboratory's best interest. The Department/Division must consider the conference's relevance, potential benefit, need to disseminate BNL-related information, and the potential for an adverse perception related to participation.</p> <p>*Note: This minimum is strongly recommended as the time required to ensure that all approvals can be completed in a timely manner. The absolute minimum time for the Laboratory to process the documentation, obtain approvals and make travel arrangements for attendance at a conference is 30 calendar days.</p> |
| Step 2 | The Department/Division POC or designee forwards the Department/Division Conference Attendance Request to the Special Conference Administrator (SCA). |
| Step 3 | The SCA compiles all Department/Division requests into a single conference request and submits the request to the Laboratory Directory or designated Deputy Director to obtain approval for attendance. |
| Step 4 | The Laboratory Director or designated Deputy Director determines the approval no later than 45 days before the date of the conference. |
| Step 5 | The SCA notifies each Department/Division POC of the approved number of attendees |

| | |
|--------|---|
| Step 3 | The DOE notifies each Department/Division / OC of the approved number of attendees. |
|--------|---|

References

DOE Order 110.3 Conference Management

| [Go to Previous Page](#) |

[Back to Top](#)

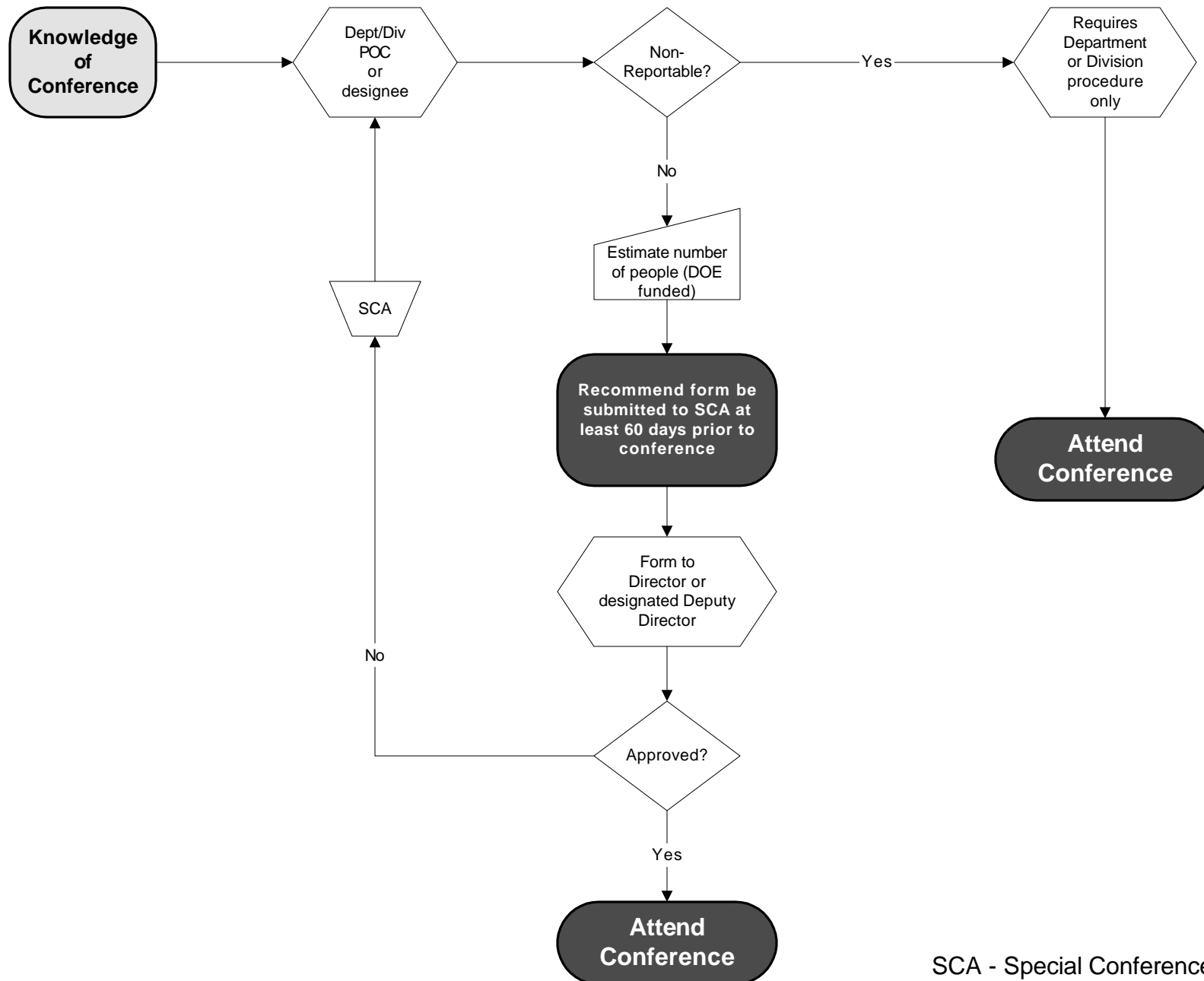
The only official copy of this file is the one online in SBMS. Before using a printed copy, verify that it is the most current version by checking the document effective date on the BNL SBMS website.

1.2-032002/standard/2a/2a02d011.htm

Send a question or comment to the [SBMS Help Desk](#)
[Disclaimer](#)

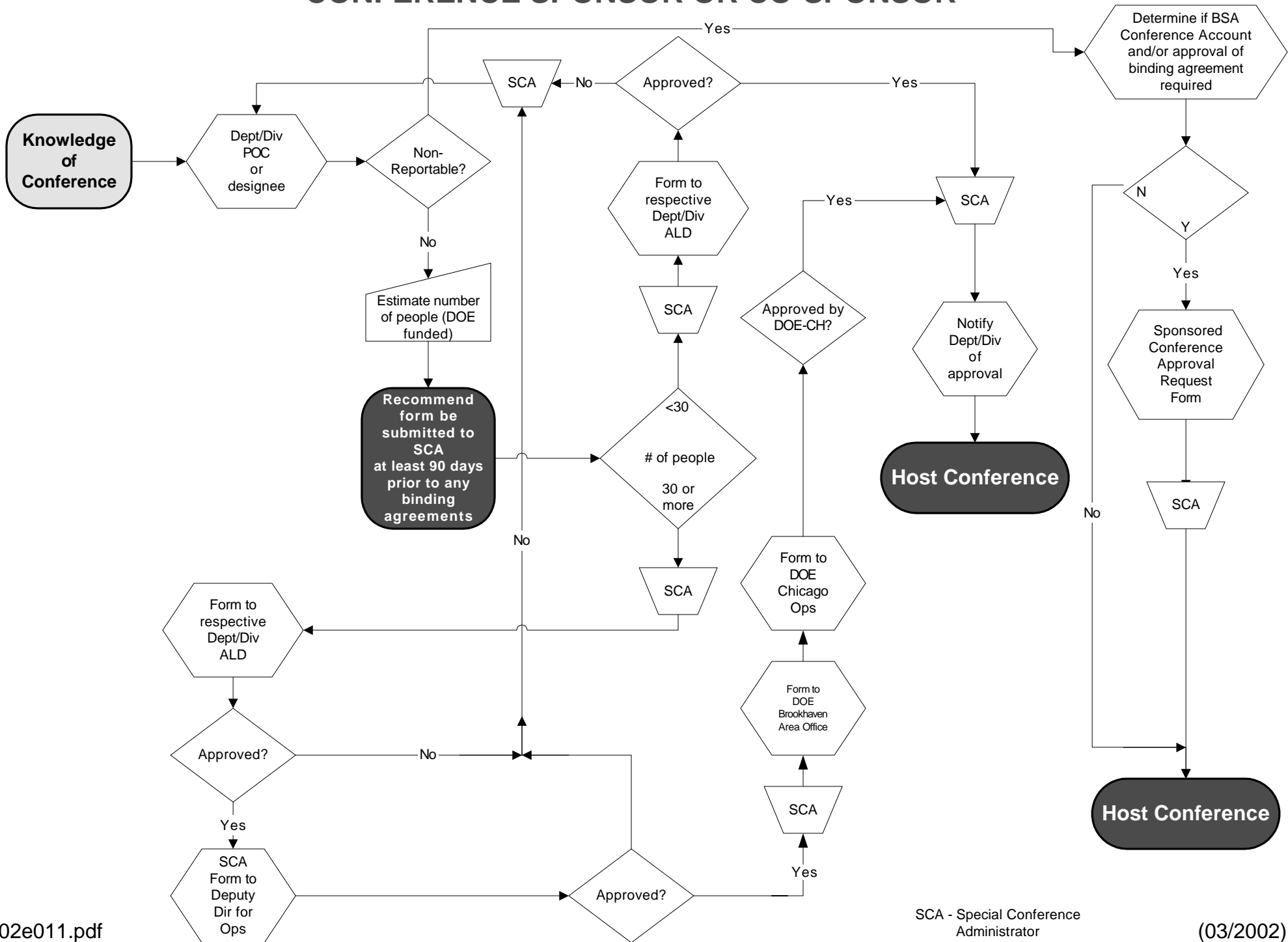
Conference Management Subject Area Flow Chart

CONFERENCE ATTENDANCE



Conference Management Subject Area Flow Chart

CONFERENCE SPONSOR OR CO-SPONSOR



Examples of Non-reportable Conferences

This list contains examples of conferences that are exempt from the requirements of DOE Order 110.3, Conference Management.

Formal structured training programs (including seminars specifically held for training purposes) that have specific objectives identified to improve certain knowledge, skills, and abilities

- National Synchrotron Light Source (NSLS) Annual Users Meeting
- RapiData
- U.S. Particle Accelerator School
- National Oilheat Research Alliance Technology Conference (NORA)
- EDM Workshop
- Professional Enhancement Courses, such as Primavera, Covey, Bylined, Baldrige

Activities concerning work not funded by DOE that is conducted by DOE contractors

- National Aeronautics Space Administration (NASA)
- Nuclear Regulatory Commission (NRC)
- National Science Foundation (NSF)
- Department of Defense (DOD)
- RIKEN

Meetings requiring only local travel (not requiring overnight lodging)

- Relativistic Heavy Ion (RHIC) retreat at State University of New York (SUNY)
- Local travel by auto or train, if travel can be made in one day (no overnight lodging)

Federal Advisory Committee meetings

- Fusion Energy Sciences Advisory Committee (FESAC)
- Secretary of Energy Advisory Board (SEAB)
- Academy of Science Reviews

Contract pre-proposal, bid opening, and negotiations

- Pre-award vendor visits
- Pre-bid meetings by Work For Others (WFO)
- Pre-bid meetings by the Department of Energy (DOE)

Public hearings and associated briefings

- Environmental public hearing
- Environmental Assessment (EA)/Preliminary Safety Assessment Report (PSAR)/Final Safety Assessment Report (FSAR) public meeting

Audits, inspections, and investigations

- Vendor inspection visits
- Vendor audits

BNL technical/business programs, projects, or peer reviews


- Legs Spin Collaboration (LSC)
- DOE Contractors Compensation Managers' Meeting
- 2nd eRHIC Workshop At Yale
- DOE Review of the Booster Applications Facilities Review
- Program reviews of DOE Sponsored programs
- Meetings associated with discussions of work at the Laboratory
- Routine program meetings at other DOE sites on DOE-sponsored work

Activities funded through arrangements, such as grants and cooperative agreements

- Small Business Innovation Research (SBIR)
- Cooperative Research and Development Agreements (CRADA)

Employees traveling to a site where work for DOE is being performed to discuss the status of the work

- Workshops, seminars, meetings specifically held to disseminate research-related developments where there is a direct benefit received



Forms
Contact List
SBMS Instructions
Help Desk

Find Subject Areas: Index ▼ Categories ▼ Alpha ▼

Show Side Menu Search Subject Areas & Legacy Documents:

*Subject Area: **Conference Management***

General Considerations for Sponsored and Co-sponsored Conferences

Effective Date: **June 2000**

Point of Contact: [Special Conference Administrator](#)

A. When managing sponsored or co-sponsored conferences, the Laboratory must do the following:

1. Keep Federal expenditures and attendance at conferences to the minimum necessary to accomplish program objectives.
2. Minimize the number and cost of DOE-sponsored exhibits/booths at all DOE and DOE-contractor-sponsored conferences by using, where practical, DOE corporate-type exhibits/booths that can be shared by DOE and DOE contractor organizations. Where exhibit booths are shared by DOE and DOE contractor organizations, the cost must be shared appropriately.
3. Justify a recurring conference (do not assume that an annual conference must be held merely because it has been held previously).
4. Select sites that minimize conference costs by, among other actions, minimizing conference administrative costs and attendees' travel and per diem costs and maximizing the use of Government-owned or -provided facilities.
5. Select sites only after evaluating cost differences of at least three prospective locations. The selection process should identify opportunities to save costs in selecting a particular conference site or the timing of the conference (e.g., off-season rates). The Department/Division Point-of-Contact must maintain written documentation of the alternatives considered and the selection rationale used. Avoid selecting resort or recreational sites unless true cost savings will result.
6. Make binding conference arrangements only after obtaining the necessary approvals. (See binding arrangements in the [Definitions](#) section. Only the Staff Services Manager has authority to make conference contractual commitments on behalf of the Laboratory).
7. Conferences sponsored by DOE contractors should not include events, such as entertainment or meals, that are being paid for by the contractor, which will result in Federal employees violating the Standards of Ethical Conduct for Employees of the Executive Branch (5 Code of Federal Regulations 2635).
8. Avoid commercial conference facilities for DOE-contractor-sponsored conferences involving classified or sensitive information.
9. Avoid holding conferences at non-DOE sites that do not meet the fire protection requirements of the Hotel and Motel Fire Safety Act of 1990 (P.L. 101-391, as amended). This requirement may be waived by the Secretary of Energy or the Executive Secretariat.
10. Use the exhibit [Criteria for Conference Approval](#) as an aid in deciding whether to hold a conference.

conference.

11. Use the [Sponsored Conference Approval Request Form](#), in requesting conference approval to ensure necessary information is included.

B. Departments/Divisions are required to designate and notify the [Special Conference Administrator \(SCA\)](#) of the person in their organization who will facilitate the implementation of these requirements and act as the point-of-contact (POC) for them. Identifying an alternate is highly recommended. The Department/Division POC will review and approve the Approval Request prepared by the conference host before forwarding it to the Department Chair/Division Manager for approval.

C. To meet DOE reporting requirements, on December 1 of each year, each Department/Division POC must submit to the SCA a report of planned conferences for the following year's first quarter (January through March). The information to be included in this report will be provided by the SCA.

D. A conference may charge a reimbursable "registration fee" to offset conference costs. That fee may not be used for any type of unallowable costs as defined in Article 32, Allowable Costs and Fixed Fee of BSA's prime contract with the DOE, for the operation of Brookhaven National Laboratory, in particular such expenses as meals, entertainment, or alcoholic beverages.

E. In connection with conferences, the Laboratory may charge a separate voluntary fee to attendees to cover such items as meals and entertainment. This fee is not reimbursable by the DOE. However, when an employee pays the voluntary fee, he/she is not required to reduce his/her per diem.

[Back to Top](#)

The only official copy of this file is the one online in SBMS. Before using a printed copy, verify that it is the most current version by checking the document effective date on the BNL SBMS website.

1.2-032002/standard/2a/2a04e011.htm

Send a question or comment to the [SBMS Help Desk](#)
[Disclaimer](#)

CRITERIA FOR CONFERENCE APPROVAL

The following areas should be reviewed and considered before approval of a BNL-sponsored conference.

1) Program Mission:

How is the conference related to the mission and goals of the organization? (Specifically, how essential is the conference to those goals and mission?)

2) Purpose and Objectives:

What is the purpose of the proposed conference?

Are alternative means available for achieving the same expected results?

Are other conferences planned or scheduled with the same objectives? Could this conference be combined with another?

If the conference is recurring, is the need for this one justified at this time?

3) Expected Benefits:

What benefits will be derived from conducting this conference?

4) Location:

Is the conference location the most cost-effective?

Is there a basis for criticism (e.g., use of a resort location)?

Have cost comparisons of other locations been considered?

Is the location necessary to accomplish the conference goal (e.g., site visit to demonstrate research and development activity)?

Is the conference site reasonably central to the majority of DOE-funded participants to lessen travel costs?

5) Estimated Support Costs:

Are support costs (e.g., printing, mailing, graphics, travel expenses, conference facilities, honorariums) reasonable and necessary?

6) Number of DOE/Contractor Employees:

Is the total number of DOE, BNL and DOE contractor conference attendees necessary to achieve the purpose for which attendance at the conference is being approved?

Is there any basis for criticism from external entities (e.g., Congress, General Accounting Office, or the Inspector General)?

What is the cost per participant?

Are there key roles that all or some proposed attendees play (e.g., speaker, chairperson, expert in a complex subject that requires expertise in several sub-areas)?

Can attendance be reduced without adversely affecting the objective?

7) Support Contractor Performance (e.g., professional planner/organizer, display booth manager):

What assignments will the contractor perform?

Do the contractor's responsibilities include any Government functions (e.g., exercising discretionary authority or making final value judgements that affects the day-to-day or long-term development, execution, and evaluation of Government programs)?

Department/Division Conference Attendance Request

Department

DATE OF REQUEST:

REQUESTED BY:

Chairperson:

Department Code:

Phone Number:

E-mail:

CONFERENCE TITLE:

SPONSORING ORGANIZATION(S):

CONFERENCE DATE(S):

CONFERENCE LOCATION:

PURPOSE AND OBJECTIVE(S) FOR ATTENDING:

NUMBER OF ATTENDEES REQUESTED:

POINT-OF-CONTACT:

SPONSORED CONFERENCE APPROVAL REQUEST FORM

Instructions: This form is for all conferences sponsored or co-sponsored by BNL. Certain conferences are exempt from DOE Order 110.3 but are required to complete this form. Non-reportable conferences, which **do not** require a BSA account and/or approval of a binding agreement, are not required to complete this form. Refer to list of reasons for non-reportable conferences in Part 2 and check the appropriate box below.

- ☐ Non-reportable Conference. Complete Parts 1, 2, and 4.
☐ Reportable Conference. Complete Parts 1, 3, and 4.

Date of Request [mm/dd/yy]:

Part 1: Conference Information (for non-reportable and reportable conferences)

1. Contacts

BNL POC: J. Swenson, ext., 2525, swenson@bnl.gov

Dept/Div POC

Dept/Div

POC Phone (631) 344-

POC Fax (631) 344-

Bldg. No.

Conf Host

Conf Host Phone

(631) 344-

Conf Host Fax

(631) 344-

Bldg. No.

Conf Coord

Conf Coord Phone

(631) 344-

Conf Coord Fax

(631) 344-

Bldg. No.

2. Conference Dates [mm/dd/yy]: from to

3. Conference Title:

4. Location of Conference:

5. This is a[an]

☐ National ☐ International Conference

6. Sponsoring Organization [name of DOE or non-DOE co-sponsor]:

7. Co-Sponsoring Organization [name of DOE or non-DOE co-sponsor]:

8. Conference purpose or objective, scope and subject matter [refer Criteria for Conference Approval, Items 1-3]:

9a. Number of Attendees (est.):

9b. Number of Attendees traveling under DOE funds (est.):

10. Total conference cost (est.) \$ [Attach a copy of the budget.]

Part 2: Non-reportable Conferences (those requiring a BSA Account and/or approval of a binding agreement)

11. Reasons for Non-reportable [For the purposes of DOE Order 110.3, the following conferences are considered "non-reportable" conferences. Check all that apply]:

- ☐ Formal, structured training programs (including seminars specifically held for training purposes) that have specific objectives identified to improve certain knowledge, skills, and abilities
- ☐ Activities concerning work not funded by DOE that is conducted by DOE contractors
- ☐ Meetings requiring only local travel (not requiring overnight lodging)
- ☐ Federal Advisory Committee meetings
- ☐ Contract preproposal, bid opening and negotiations
- ☐ Public hearings and associated briefings
- ☐ Audit, inspection and investigation activities
- ☐ BNL technical/business program, project, or peer reviews
- ☐ Activities funded through arrangements such as grants and cooperative agreements
- ☐ Employees traveling to a site where work for DOE is being performed to discuss the status of the work.

12. Publication of Proceedings:

Proceedings ☐ will ☐ will not be published.

Cost to publish proceedings (est.) \$

Publisher:

13. Agenda [Attach a copy of the proposed Agenda.]

Part 3: Reportable Conferences

14. Rationale for Conference Location [Refer to Criteria for Conference Approval, Item 4]:

- a. Provide a rationale and justification for site selection:
- b. Provide a cost comparison of alternative sites considered if location is not a principal facility site of the sponsoring organization:
- c. Provide a certification that the site selected is the most cost-effective considering costs, such as travel, per diem, and conference logistics.

15. Estimated Cost Breakdown: [Refer to Criteria for Conference Approval, Item 5]:

DOE Travel and Per Diem Costs:

- a. DOE Employees: \$
- b. Contractor Employees: \$
- Total DOE Travel Costs: \$

Other Expenses:

- c. Logistics [facility arrangements]: \$
- d. Supplies and Support Equipment [e.g., materials, printing, equipment] \$
- e. Other Costs (Specify) [e.g., direct labor support, overhead]: \$

| | |
|--|----|
| Total Other Expenses: | \$ |
| Total Estimated DOE Costs: | \$ |
| Total Estimated Non-DOE Co-Sponsor Provided Support: | \$ |
| Specify Source: | |

Will there be Registration fees? What will they be used for? Are meals included?

16. Estimated Total Number of Conference Attendees [Refer to Criteria for Conference Approval, Item 6]:

| | <u>Traveling</u> | <u>Non-Traveling</u> |
|----------------------|------------------|----------------------|
| DOE Employees: | | |
| Headquarters: | | |
| Field: | | |
| Contractor Employees | | |
| BNL | | |
| ANL | | |
| LBNL | | |
| Other: | | |
| | _____ | |
| Subtotals: | | |
| All Others: | | _____ |
| Total: | | |

17. Support Contractor Performance [Refer to Criteria for Conference Approval, Item 7]:

18. Impact Statement [Provide an impact statement of effect if the conference is not approved]:

Part 4: Review and Approval

Conference Title:

Dates: **from** **to**

Location:

Reviewed by:

Conference Coordinator/Host: _____ Date: _____

Dept./Div. Point of Contact: _____ Date: _____

Approved by:

Dept. Chair/Div. Manager: _____ Date: _____


Stop here and send this form to SCA, Staff Services Division, Bldg. 179B, who will seek remaining approvals.

Staff Services Manager: _____ Date: _____

If this Conference is reportable, the following additional approvals are required:

BNL Assoc./Assistant Lab Director _____ Date: _____

BNL Director/Deputy Director _____ Date: _____



Forms

Contact List

SBMS Instructions

Help Desk

Find Subject Areas:

Index ▼

Categories ▼

Alpha ▼

Show Side Menu

Search Subject Areas & Legacy Documents:

Definitions: Conference Management

Effective Date: **June 2000**

Point of Contact: [Special Conference Administrator](#)

| Term | Definition |
|--|---|
| binding agreements | The Staff Services Manager must approve binding agreements (hotel contracts, catering and entertainment commitments) before execution by conference sponsors/hosts. This applies to all conferences (whether or not they are subject to DOE Order 110.3 Conference Management). For those conferences subject to DOE Order 110.3, this approval may not be given before the required approval of the conference. |
| conference | <p>Any meeting requiring non-local travel except as noted below, and includes a symposium, conference, or similar meeting. The following are reasons for non-reportable types:</p> <ul style="list-style-type: none"> • Formal structured training programs (including seminars specifically held for training purposes) that have specific objectives identified to improve certain knowledge, skills, and abilities; • Activities concerning work not funded by DOE that is conducted by DOE contractors; • Meetings requiring only local travel (not requiring overnight lodging); • Federal Advisory Committee meetings; • Contract preproposal, bid opening, and negotiations; • Public hearings and associated briefings; • Audits, inspections, and investigations; • BNL technical/business program, project, or peer reviews; • Activities funded through arrangements, such as grants and cooperative agreements; and • Employees traveling to a site where work for DOE is being performed to discuss the status of the work. <p>See the exhibit on Examples of Non-reportable Conferences for examples of these non-reportable types.</p> |
| Department/Division Point-of-Contact (POC) | The point-of-contact for the Special Conference Administrator (SCA) . |
| directorate | The Director, the Deputy Directors, and the Associate/Assistant Laboratory Directors (ALDs). |
| DOE contractor employee | An employee of one of DOE's contractors for a laboratory or other DOE site. |
| guest | Any non-employee who visits the Laboratory for whom the Laboratory establishes |

| | |
|-------------------------------|---|
| guest | Any non-employee who visits the Laboratory for whom the Laboratory establishes and maintains a permanent record. A permanent record may be required if the visitor meets one or more of the following conditions: 1) Visits a facility for which training is required; 2) Visits a facility requiring the use of a radiation monitoring device; 3) Visitor or accompanying family member is a foreign national; 4) Visitor is expected to spend more than three days at the Laboratory. |
| sponsorship or co-sponsorship | Having some control over the conduct of the conference and either having some financial responsibility or providing in-kind services (non-monetary) for the conference, including control sufficient to influence costs, venue, or program content. Minor levels of support, such as an individual's service on a steering committee or the provision of clerical assistance, is not sponsorship or co-sponsorship. |
| visitor | This category includes a variety of people who visit the Laboratory for whom there is no need to maintain a permanent record. It includes short-term consultants/visitors, individuals who perform work or a service at the Laboratory, who are on-site for one to three days, family members of employees and guests, library users, and selected groups, such as Physical Review staff or high school students on-site for course studies. |

[Back to Top](#)

The only official copy of this file is the one online in SBMS. Before using a printed copy, verify that it is the most current version by checking the document effective date on the BNL SBMS website.

1.2-032002/standard/2a/2a00I011.htm

Send a question or comment to the [SBMS Help Desk](#)
[Disclaimer](#)

| | | | | |
|-------------|-----------------------|------------------------------|-----------------------------------|---------------------------|
| SBMS | Forms | Contact List | SBMS Instructions | Help Desk |
|-------------|-----------------------|------------------------------|-----------------------------------|---------------------------|

Find Subject Areas:

[Show Side Menu](#) **Search Subject Areas & Legacy Documents:**

Revision History: Conference Management

Point of Contact: [Special Conference Administrator](#)

Revision History of this Subject Area

| Date | Description | Management System |
|----------------------------------|--|------------------------|
| September 2004 -- Minor Rev. 1.4 | Brookhaven Site Office (BHSO) replaces Brookhaven Area Office (BAO). | Administrative Support |
| June 2000 | This subject area was developed to provide the guidelines, requirements, and responsibilities for managing attendance at conferences and sponsoring conferences. The intent of this subject area is to minimize costs and attendance by DOE and DOE contractor employees at all conferences. It is a new subject area that was developed using the process for Standards-Based Management development. | Administrative Support |

[Back to Top](#)

The only official copy of this file is the one online in SBMS. Before using a printed copy, verify that it is the most current version by checking the document effective date on the BNL SBMS website.

1.4-092004/standard/2a/2a00a011.htm

Send a question or comment to the [SBMS Help Desk](#)
[Disclaimer](#)